

## Organization Administration

- Only users from an organization (company) who are members of that Organization's Super Administration group or the Organization's Administration group, unless noted otherwise, can perform the actions described in this guide.

Before team members can be added to a project workspace a Citadon CW account must be created providing a log-in ID and Organization ID by their Organization administrator(s). The functions that an Organization Administrator may need to perform are:

- Create Organization Units (sub-organizations such as divisions and departments). *Note that Citadon System Administrators are the only ones who can create the initial Organization (top-level, parent organization). This parent organization must be created before OUs may be created.*
- Add or remove organization users and create their Citadon CW account.
- Modify Organization information.
- Create Organization Workspaces to manage organization's functional information.
- Create groups, and configure Business Processes and reports for Organization Workspaces.

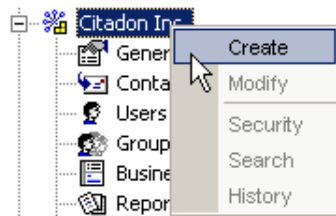
From the left-hand navigation bar, select your Organization in the **Organization Administration** tab

Click the + sign to **expand** an Organization. Continue expanding the listing until you are at the appropriate level to administer the Organization Unit.

### Create or Modify an Organization Unit

To create new Organizational Units users must be a member of the Organization's Account Administration group.

To create an Organizational Unit, right click on the appropriate parent Organization/OU name and select **Create**.




Use the **Create Organization Wizard** to add the necessary input for creating the OU.

### Organizational Unit General Information

The first step in the wizard is to add the general information for the organizational unit.

- Organization Name:** Type in the name of the organizational unit. It is recommended that the parent organization name be included in the OU name. For instance, Citadon Engineering would be the name for the Engineering OU in the Citadon organization.
- Organization Status:** Set the status to Active.
- Workspace Status:** Typically, this would be set as **Inactive** until authorized to create an Organizational Workspace.
- Administrator:** The creator of the Organizational Unit is the OU Administrator by default. If you desire to assign administration to another person, you must first create the account, if it does not already exist, for this person. In addition, if you want to maintain administration involvement but have others assist with administration, you should add others to the Super Administration or Administration group. See the Creating/Modifying Groups section.
- Parent Organization:** This is set automatically and cannot be changed. Make sure it is correct. If not click on **Cancel** and start over from within the correct Organization.
- Organization ID:** This also is set by default and cannot be changed. It is the ID of the top-level Organization.
- Code:** This is an optional field that can be used to add a unique identifier for this OU, such as a work group number.
- Other Non-mandatory Fields:** Trade, Profession, Web Site, Description, and Notes are optional fields that can be used to provide additional information and clarification.

When finished, click 

### Contact Information

Add the mandatory items - Contact Type, Address1, City, Postal Code, Phone Number, and email address - in the Contact Information screen. The address for each OU must be unique. Therefore, if necessary, add a unique item to the Address2 line, such

as a floor, suite or room number. **Note:** the E-mail field typically contains the email address of the primary administrator for the OU.

When finished, click You will be asked to confirm the input information. Click , if adjustments are necessary. Otherwise Click to create the OU. This will take a few minutes to complete.

When the OU is created you will be presented with a confirmation screen.

Click to continue on and add additional contact information, create user accounts and create groups. Creating users and Creating Groups will be covered in the next section. Click to close the wizard.

## Creating and Modifying CW User Accounts

User accounts may be created in two different ways, singly or in groups.

**Note: Before creating users it is recommended that they be contacted and informed that accounts will be created for them, and provided with their Organization ID which will be needed to complete their registration.**

### Create Single User Account

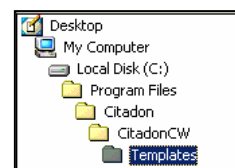
To create a single user, click

Complete the mandatory fields - First name, Last name, Login ID, Email and Contact Information noted with an asterisk (\*). Login ID must be at least 6 characters and is case sensitive. **Each person must have a unique email address.** In addition, an Account Expiration date must be set (preferably far enough in the future). Modify Password Expiration and Session timeout, if necessary.

### Create Multiple user Accounts from Template

For creating accounts for more than one user use the Citadon Create User – Basic Excel template.

It is recommended that the Citadon Create User – Basic Excel template be used to create one or more user accounts by importing the template. The excel template can be found in the C:/Program Files/Citadon/Citadon CW/Templates subfolder on your hard drive.

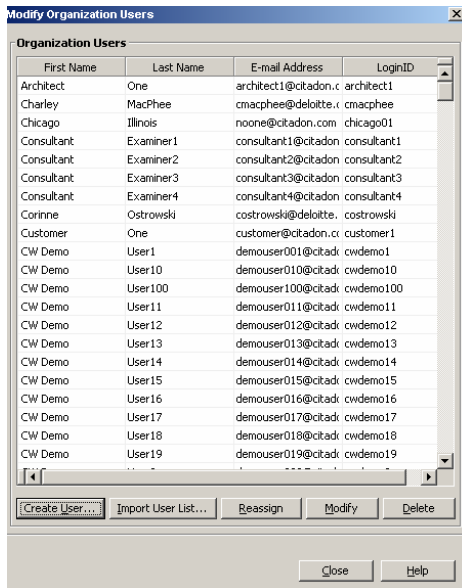


Complete the template by adding the mandatory fields, First name, Last name, Login ID, Email and contact information noted above with an asterisk (\*). Login ID must be at least 6 characters and is case sensitive. **Each person must have a unique email address.** In addition, an Account Expiration date must be set (preferably far enough in the future). Modify Password Expiration and Session timeout, if necessary. Use copy-paste commands whenever possible to duplicate addresses and minimize input. When the template is

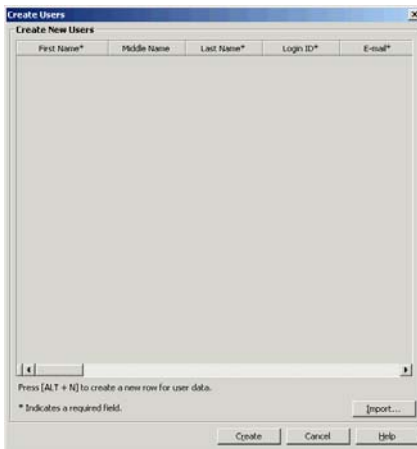
complete, rename it and save to your preferred directory on your hard drive.

	A	B	C	D	E
1	*First Name	Middle Name	*Last Name	*Login ID	*E-mail
2	Subcontractor		One	subcontractor1	subcontractor1@citadon.com
3	General		Contractor1	gcontractor1	gcontractor1@citadon.com
4	Architect		One	architect	architect@citadon.com
5					
6					

Return to the Modify Organization Users screen in CW.



Click **Import User List...**



From the Create New Users screen, click **Import...**, and navigate to the folder you saved the completed template, select it and click **Open**. In a few moments the names will appear in the Create User listing. Users will be notified by email that an account has been created for them. A link will be provided for them to login to the Citadon Registration page where they will be asked to review their

contact information, record their desired password and secret questions and answers that are used if passwords are forgotten.

If modifications are needed to be made to the user's account information, click **Modify** and make the necessary changes on the appropriate tab.

Refer to *Quick Reference Guide - Reassigning Users* for information on how to reassign all project workspace responsibilities from one individual to another. User responsibilities must be reassigned before an individual can be removed from an organization.

### Creating and Modifying Groups

Groups are only required for use with Organizational Workspaces (OWS) or for assigning many organizational users to several or all project workspaces. Refer to the *Quick Reference Guide - Addition of Every Project Groups to Project Workspaces*. Creating groups for OWS follows the same method as creating groups for Project Workspaces. Refer to *Quick Reference Guide - Modifying a Project Workspace* for guidance.

### Organizational Reports

The one standard report that is an organizational report is the User/Group Login Report. A Users/Group Login Report enables you to click on a user or group within the report to see the details of each login session for the user or group selected, based on the date range chosen. Refer to the *Quick Reference Guide - Reports* for guidance on how to create the User/Group Login Report as well as other reports that may be run for Organizational Workspaces.

### Organization Workspaces (optional)

To create Organizational Workspaces, select the General Information for appropriate Organization or OU from the list of Organizations and click **Modify**. Next, set the Organization Workspace status to Active. This will create a workspace. Only users who are in the organization Account Administration group can set the OWS status to Active.

## Citadon Customer Support

### Citadon CW

**Hours: 6am - 6pm PST**

<mailto:support@citadon.com>